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ABSTRACT

This vocational program guide is intended to assist local administrators, regional coordinating councils, teachers, and others throughout Florida in offering a financial records clerk program. The following topics are covered: program content and structure (program description, job titles and descriptions, content, standards for program courses, curriculum framework, and student performance standards); facilities (design criteria; suggested equipment and supplies; suggested audiovisual equipment, supplies, and audiovisual aids, and safety); program implementation (student admission requirements, suggested instructional approach, suggested teaching methods, evaluation criteria, certificate of completion, student learning guide, cooperative training, and student organization participation); professional development (teacher standards and technical updating and professional organizations and support services); and instructional resources. A sample student learning guide is appended. The attached Career Merit Achievement Plan (Career MAP) is designed for use in recording the progress of students enrolled in a financial records training program. (MN)

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# FLORIDA VOCATIONAL PROGRAM GUIDE FOR

# FINANCIAL RECORDS CLERK

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FLORIDA VOCATIONAL
PROGRAM GUIDE FOR

# FINANCIAL RECORDS CLERK

State of Florida
Department of Education
Tallahassee, Florida
Betty Castor, Commissioner
Affirmative action/equal opportunity employer

*Division of Vocational, Adult, and Community Education*
Bureau of Vocational Program and Staff Development

July 1989

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## INTRODUCTION

The Florida Vocational Program Implementation Guide can be applied to all vocational programs in Florida. This program guide, however, was developed specifically for the Financial Records Clerk program to provide information that will be useful to local school-district and community-college administrators, faculty and instructors, program advisory committee members, regional coordinating councils, regional criminal justice training centers, and others charged with the responsibility of offering vocational education programs. The final planning and evaluation of any educational program, however, must be done within the context of local conditions. This publication will serve to identify the major concerns that should be considered in the organization, operation, and evaluation of a vocational education program.

Vocational education has evolved to meet the needs of students desiring to pursue selected careers or vocations. In general, vocational education is designed to provide programs, services, and activities that are realistic in light of present and future employment opportunities. In recent years, applications of science and technology have expanded rapidly, increasing the education and training required of personnel. The new technologies require many additional technical supportive staff to carry out both standardized and specialized procedures.

Today, vocational education is an increasingly viable option for students. The Florida Department of Education (DOE) shares with business, government, and industry the determination to provide opportunities for upward mobility to as many Floridians as possible. For this to become a reality, exemplary career educational programs must be created and these programs must be consistent throughout the state.

**State Board of Education Administrative Rule 6A-10.24: Articulation between universities, community colleges, and school districts** outlines steps and guidelines that will bring about a systematic interrelationship among Florida institutions offering similar or related courses and programs. The rule states, in part, that

> when a student transfers among postsecondary vocational-technical centers, community colleges, and universities, the receiving institution shall award credit for courses satisfactorily completed at the previous institutions when the courses are judged to be equivalent to courses offered at the receiving institution.

This program guide helps ensure that equivalency. Throughout Florida, vocational programs, if implemented according to the criteria described in this document, will help many citizens fill an important place in our state and national work force.

## PROGRAM CONTENT AND STRUCTURE

The content of the Financial Records Clerk program is based on occupational competencies and employability skills required for entry into certain banking occupations. The basic content of this program is described in the Florida Curriculum Framework and Student Performance Standards (SPSs).

Students enrolled in this program should be able to benefit from the instructional content with reasonable expectations for entry-level employment upon successful completion of the program.

This section includes a program description, job titles, job descriptions, a content statement, and the Curriculum Framework and Student Performance Standards.

### Program Description

Business Education is a group of planned, specialized instructional programs designed to enable students to enter employment, to make career progress, and to refine prescribed competencies required for employment in a cluster of business occupations or in a specific occupation chosen as a career objective.

The Financial Records Clerk program includes both practical and classroom learning experiences that are concerned with providing students with career information and job requirements for banking occupations. It provides students with an initial exposure to the skills and attitudes associated with careers in banking. These basic skills and attitudes are indicated as intended outcomes in the Curriculum Framework of this guide.

### Job Titles and Descriptions

Job Title: Payroll Clerk (DOT #215.482-010)

Description: The payroll clerk computes wages and posts wage data to payroll records, using a calculator. The clerk also operates a posting machine to compute and record earnings from time sheets and work tickets, subtracting deductions such as income-tax withholdings, social security payments, union dues, insurance, credit union payments, and bond purchases, and enters net wages on earning record cards, checks, check stubs, and payroll sheets. The clerk may also prepare periodic reports of earnings and income tax deductions; keep records of sick leave pay and nontaxable wages; prepare and distribute pay envelopes; keep records of goods produced by individual workers, units, or departments; and prepare time records. In addition, the clerk may compute wages for employees working on bonus, commission, or piecework systems, and be designated as bonus clerk or piecework time clerk and financial records clerk.

Job Title: Statistical Clerk (DOT #216.382-062)

Description: Compiles data and computes statistics for use in statistical studies, using a calculator and an adding machine. The clerk also compiles statistics from source materials, such as production and sales records, quality-control and test records, personnel records, timesheets, survey sheets, and questionnaires. The

clerk assembles and classifies statistics, following prescribed procedures, and computes statistical data according to formulas, using a calculator. The clerk may also verify the authenticity of source material. According to the type of industry and statistics compiled, the clerk may be designated as census clerk, mileage clerk, production-statistical clerk, sales-record clerk, steam-plant records clerk, time-analysis clerk, or traffic enumerator. Persons who compile actuarial statistics, charts, and graphs may be designated actuarial clerks.

## Content

The Financial Records Clerk is a competency-trained worker. The program content is directed toward the learning, in actual or simulated work conditions, of selected competencies identified by industry as necessary for entry-level employees. These competencies, as suggested in this publication, are taught to prepare financial records students to function under the immediate supervision of financial records management personnel.

Because job requirements for the Financial Records Clerk vary in employing agencies, the skills that are taught in the program provide basic job-entry preparation. If additional skills are required, they may be taught by the employing agencies through inservice education.

## Standards for Program Courses

Program objectives should be consistent with the Vocational Education Program Courses Standards as approved by the Florida State Board of Education.

Provided on the following pages are the Curriculum Framework and Student Performance Standards for Financial Records Clerk courses as listed in the official Vocational Education Program Courses Standards document. Since these SPSs are occasionally updated, you may need to check with your district's Business Occupations Education Supervisor and the regional Program Specialist for a current version every year.

CURRICULUM FRAMEWORK FLORIDA DEPARTMENT OF EDUCATION

PROGRAM AREA: Business

EFFECTIVE DATE: July, 1989

PROGRAM TITLE: Financial Records Clerk

CODE NUMBER: Secondary 8203100 Postsecondary AC00091

Florida CIP 0507.019901

SECONDARY SCHOOL CREDITS: 3 COLLEGE CREDITS: ____

POSTSECONDARY ADULT VOCATIONAL CREDITS: ____

APPLICABLE LEVELS: ___ 7-9 ___ 9-12 x Other 10-12, 30, 31
___ Postsecondary Adult Vocational
___ Postsecondary Vocational

CERTIFICATION COVERAGE: BUS ED @4 I 2 VOE @7
TEACH CBE @7 ACCTING 7
BOOKKEEPING @4 @7

I. **Major Concepts/Content.** The purpose of this program is to prepare students for employment as payroll clerks (215.382-010) and statistical clerks or provide supplemental training for persons previously or currently employed in these occupational areas.

The content includes such activities as keeping and verifying records or business or financial transactions; receiving and disbursing money in banks or other establishments; computing and verifying amounts due for goods and services; preparing payrolls and timekeeping records; and posting primary financial or statistical data to accounting records.

Listed below are the courses that comprise this program when offered at the secondary level:

8209010 Typewriting I/Fundamentals
8203010 Accounting I
8206110 Business Computer Applications I

II. **Laboratory Activities.** Laboratory activities are an integral part of the program and include the use of keyboarding/typewriting systems, calculators, computers, and peripheral equipment.

III. **Special Note.** Concepts of American enterprise are included in this program so that students may function effectively in the American enterprise economic system.

Future Business Leaders of America (secondary) and Phi Beta Lambda (postsecondary) are the appropriate vocational student organizations for providing leadership learning experiences and for reinforcing specific vocational skills. When provided, these activities are considered an integral part of this instructional program.

The cooperative method of instruction is appropriate for this program. Whenever the cooperative method is offered, the following is required for each student: a training plan signed by the student, teacher, and employer, which includes instructional objectives and a list of on-the-job and in-school learning experiences; and a work station which reflects equipment, skills, and tasks which are relevant to the occupation which the student has chosen as a career goal. The student must receive compensation for work performed.

In accordance with Section 233.0695 F.S., the minimum basic skills grade level required for this postsecondary adult vocational program is: Mathematics 8.0, Language 8.0. This grade level number corresponds to a grade equivalent score obtained on a state-designated basic skills examination.

The typical length of this program for the average achieving student is 450 hours.

The particular outcomes and student performance standards which the handicapped student must master to earn credit must be specified in the student's individual educational plan (IEP). Additional credits may be earned when outcomes and standards are mastered in accordance with the requirements indicated in subsequent IEP's. The job title for which the student is being trained must be designated in the IEP.

IV. **Intended Outcomes.** After successfully completing this program, the student will be able to:

01. Perform telephone activities.
02. Perform math computations.
03. Perform keyboarding/typewriting activities.
04. Perform filing activities.
05. Perform business records activities.
06. Perform mail handling activities.
07. Perform communication activities.
08. Develop human relations skills.
09. Develop appropriate grooming habits.
10. Perform job application activities.
11. Demonstrate a knowledge of information processing concepts.
12. Develop leadership skills.
13. Perform consumer economics activities.
14. Identify business law concepts.
15. Perform bookkeeping/accounting activities.
16. Identify functions of data processing.
17. Perform decision-making activities.
18. Operate data-entry equipment.

STUDENT PERFORMANCE STANDARDS EFFECTIVE DATE: July, 1989

PROGRAM AREA: Business SECONDARY NUMBER: 8203100

PROGRAM TITLE: Financial Records Clerk POSTSECONDARY NUMBER: AC00091

01.0 PERFORM TELEPHONE ACTIVITIES--The student will be able to:

- 01.01 Identify telephone services and types of calls.
- 01.02 Locate telephone numbers and addresses.

02.0 PERFORM MATH COMPUTATIONS--The student will be able to:

- 02.01 Solve addition, subtraction, multiplication, and division problems manually.
- 02.02 Solve addition, subtraction, multiplication, and division problems using a calculator.
- 02.03 Solve commission problems.
- 02.04 Solve finance charge and annual percentage rate problems.
- 02.05 Solve markup and markdown problems using a ten-key calculator.
- 02.06 Solve compound interest problems using a ten-key calculator and compound interest table.
- 02.07 Determine where sufficient, insufficient, or extraneous information is given for solving a problem.
- 02.08 Complete an invoice.
- 02.09 Compute totals and sales tax on a sales slip.
- 02.10 Solve addition, subtraction, multiplication, and division problems using a ten-key calculator or numeric pad.
- 02.11 Compute discounts.

03.0 PERFORM KEYBOARDING/TYPEWRITING ACTIVITIES--The student will be able to:

- 03.01 Demonstrate keyboarding techniques.
- 03.02 Identify operative parts of keyboarding equipment.
- 03.03 Identify formatting principles.
- 03.04 Demonstrate speed and accuracy in typing straight copy material.
- 03.05 Type business letters and envelopes.
- 03.06 Type interoffice memoranda.
- 03.07 Type tabulated information.
- 03.08 Type different sizes of cards.

04.0 PERFORM FILING ACTIVITIES--The student will be able to:

- 04.01 Index, code, sort, and file materials alphabetically.

05.0 PERFORM BUSINESS RECORDS ACTIVITIES--The student will be able to:

05.01 Prepare checks and stubs.
05.02 Endorse checks using special endorsement.
05.03 Prepare a deposit slip and adjust a checkbook.
05.04 Prepare bank reconciliations.
05.05 Enter data into an accounts payable system.
05.06 Enter data into an accounts receivable system.
05.07 Enter data into a cash payments system.
05.08 Enter data into a cash receipts system.
05.09 Enter data into a payroll system.

06.0 PERFORM MAIL HANDLING ACTIVITIES--The student will be able to:

06.01 Classify mail.
06.02 Locate ZIP codes.

07.0 PERFORM COMMUNICATION ACTIVITIES--The student will be able to:

07.01 Locate and record information retrieved from written sources.
07.02 Spell and define words, including business terminology.
07.03 Follow oral and written instructions.
07.04 Compose and keyboard a letter of application.
07.05 Compose and keyboard a resume.

08.0 DEVELOP HUMAN RELATIONS SKILLS--The student will be able to:

08.01 Demonstrate appropriate work habits.
08.02 Identify traits that promote good human relations and increase job performance.

09.0 DEVELOP APPROPRIATE GROOMING HABITS--The student will be able to:

09.01 Identify appropriate attire and grooming for a business office.

10.0 PERFORM JOB APPLICATION ACTIVITIES--The student will be able to:

10.01 Complete employment forms.
10.02 Classify behaviors considered to be appropriate or inappropriate in a job interview situation.
10.03 Compose and type a letter of application and a resume.

11.0 DEMONSTRATE A KNOWLEDGE OF INFORMATION PROCESSING CONCEPTS--The student will be able to:

11.01 List the major programming languages used in business data processing.
11.02 Locate requested information on a computer printout.
11.03 Identify applications of computers in business.
11.04 Classify fields found within an employee payroll record.
11.05 Classify fields required on a purchase requisition.
11.06 Classify characteristics of recording transactions as either on-line, point-of-sale, or manual.

11.07 Calculate batch totals for computer processing.
11.08 Balance a payroll register.

12.0 DEVELOP LEADERSHIP SKILLS--The student will be able to:

12.01 Choose the appropriate action in a situation requiring application of business ethics.
12.02 Identify basic principles of parliamentary procedure.
12.03 Greet and introduce individuals.

13.0 PERFORM CONSUMER ECONOMICS ACTIVITIES--The student will be able to:

13.01 Identify basic concepts of the American economic system.

14.0 IDENTIFY BUSINESS LAW CONCEPTS--The student will be able to:

14.01 Identify basic endorsements used in negotiating commercial paper.
14.02 Identify original and secondary parties to commercial paper.

15.0 PERFORM BOOKKEEPING/ACCOUNTING ACTIVITIES--The student will be able to:

15.01 Identify the basic elements of the bookkeeping/accounting cycle.
15.02 Prepare an eight-column work sheet.
15.03 Prepare a post-closing trial balance.
15.04 Record transactions in the general journal (journalize).
15.05 Post entries from the general journal to the general ledger.
15.06 Prepare an income statement.
15.07 Prepare an equity statement.
15.08 Prepare a balance sheet.
15.09 Prepare, record, and post adjusting entries.
15.10 Prepare, record, and post closing entries.
15.11 Record purchases transactions in the purchases journal.
15.12 Post purchases journal entries to the accounts payable ledger and general ledger.
15.13 Record a purchases returns and allowances transaction in the general journal.
15.14 Post a purchases returns and allowances transaction to the accounts payable ledger and general ledger.
15.15 Record a sales transaction in the sales journal.
15.16 Post sales journal entries to the accounts receivable ledger and general ledger.
15.17 Prepare a credit memorandum.
15.18 Record a sales returns and allowances transaction in the general journal.
15.19 Post a sales returns and allowances transaction to the accounts receivable ledger and general ledger.
15.20 Record cash receipts transactions in the cash receipts journal.
15.21 Post cash receipts journal entries to the accounts receivable ledger and general ledger.
15.22 Record cash payments transactions in the cash payments journal.
15.23 Record the transactions necessary to establish a petty cash fund in the cash payments journal.

15.24 Record the transactions necessary to replenish petty cash in the cash payments journal.
15.25 Post the cash payments journal entries to the accounts payable ledger and general ledger.
15.26 Prepare a schedule of accounts payable.
15.27 Prepare a schedule of accounts receivable.
15.28 Prepare a W-4 form (Employee's Withholding Allowance Certificate).
15.29 Process a time card.
15.30 Prepare an employee earning record.
15.31 Prepare a payroll voucher check.
15.32 Prepare a payroll document/record.
15.33 Prepare a W-2 form (Wage and Tax Statement).

16.0 IDENTIFY FUNCTIONS OF DATA PROCESSING--The student will be able to:

16.01 Identify computer hardware and software.
16.02 Identify generic data processing terms.
16.03 Identify the relationship between a source document and a single transaction on a unit of record.
16.04 Identify major types of careers in data processing with the duties and educational requirements of each.
16.05 Sequence and define the steps of a processing cycle.
16.06 Identify symbols used in flowchart applications.

17.0 PERFORM DECISION-MAKING ACTIVITIES--The student will be able to:

17.01 Choose appropriate actions in situations requiring application of business ethics.

18.0 OPERATE DATA-ENTRY EQUIPMENT--The student will be able to:

18.01 Set up a work station following correct procedures for logging on and off the system.
18.02 Prepare the key entry format for a data entry device.
18.03 Enter and verify data from source documents.
18.04 Add, modify, delete, and correct records in a file.
18.05 Locate information in a data file.
18.06 Identify correct solutions to error messages using a reference manual.

## FACILITIES

This section includes facility design criteria, a list of suggested equipment and supplies, and safety for the program.

### Design Criteria

The facility should provide space and learning stations to enable the instruction to meet program objectives. **Florida State Board of Education Rule 6A-2.32** specifies the size of space and occupancy design criteria that school districts or community colleges must follow in planning and designing facilities for Financial Records Clerk programs. According to this rule, facility sizes recommended for a one-time occupancy design capacity of twenty students are as follows:

| Program Facility | Minimum (sq. ft.) | Normal (sq. ft.) | Maximum (sq. ft.) |
|---|---|---|---|
| Laboratory | 49 | 52 | 54 |
| Classroom | 25 | 27 | 29 |
| Library/Reference | 30 | 32 | 34 |
| Lockers, Student | 85 | 90 | 95 |
| Storage Area | (see S.B.E 6A-2, 7 (D) P-5) | | |
| Teacher Planning (per occupant) | 100 | 105 | 110 |

For further information on spaces, refer to **S.B.E. 6A-2.**

District schools and community colleges desiring to vary from size and occupancy design criteria may do so by providing justification in the educational specifications documents, which are subject to the approval of the Office of Educational Facilities Construction.

It is recommended that the facility be designed to the maximum square footage whenever possible if growth is anticipated. Attrition should be considered when determining student capacity. Space is allotted based on the number of students admitted. Should the average number of students admitted per year be more than twenty, additional space will be allotted. This space can be added to existing space to increase room size or can be utilized as necessary to enhance student learning (e.g., additional classrooms, learning lab, etc.).

A double sink with hot and cold running water and work ledge space is necessary in demonstration and laboratory areas. Electrical outlets are needed for both 220 and 110 volts. A stove and refrigerator unit will require a 220-volt outlet. Several 110-volt outlets should be available throughout the classroom and demonstration areas for media and electrical medical equipment.

Effective vocational education must be taught in a facility with equipment similar to what will be found in a modern work situation. The overall approach to planning for the Financial Records Clerk education suite should be from the point of view that it will, insofar as possible, simulate the business environment. Additionally, the facility should, whenever possible, be located close to or within existing business education programs to facilitate sharing instructional equipment and

classroom space. Parking should be located relatively close to the facility because of frequent off-campus travel.

**Suggested Equipment and Supplies**

Instructional resources including equipment and supplies should be provided and utilized to enable the instruction to meet program objectives.

The following list indicates suggested items of equipment and supplies needed to properly equip a laboratory for the Financial Records Clerk program:

| Number of Items | Descriptions |
|---|---|
| 20 | Desks or tables |
| 20 | Adjustable-posture chairs with casters |
| 1 | Demonstration stand |
| 1 | Bond copy machine |
| 5 | Microcomputers with printers |
| 1 | Photocopy reducer |
| 20 | Calculators with electronic display and printing capability |
| 1 | Audiovisual cart with electric leg |
| 1 | Overhead projector |
| 1 | Projection screen |
| 20 | Microcomputers |
| 1 | Filmstrip projector |
| 20 | Transcribing machines |
| 3 | Storage cabinets (cassette, A/V, floppy disk, etc.) |
| 1 | Dictionary stand |
| 1 | Magazine rack |
| varied | Audiovisual system for individualized instructional programs |
| 1 | Videotape recorder and monitor |
| 1 | Lettering machine |

**Suggested Instructional Materials, Supplies, and Audiovisual Aids**

Acetate (for transparencies)
Adding machine, ten-key
Audiocassettes
Books, reference
Desk trays
Dictionaries
Disks, floppy
File folders and labels
Grease pencils or transparency pens
Individualized instructional materials for typewriting, office machines, and other business programs
Microcomputer software
Paper, bond copy
Paper, carbon
Paper, microcomputer printer

Paper clips
Paper punch
Pencil sharpener, electric
Periodicals, business-related
Postal scales
Practice sets
Practice sheets
Reference manuals
Rubber bands
Rulers
Scissors
Staple remover
Stapler, electric
Staplers, manual
Tape, adhesive, with dispenser
Tape, correction
Telephone directories
Thumbtacks
Timer, interval
U.S. ZIP Code directories
Videocassettes, blank
Wall charts
Wallboard, chalkless, and marking pens
Workbooks

**Safety**

The Florida State Board of Education established rules for the operation of public schools. Chapter 6A-2, Part III, Section B of these rules contains the standards for existing educational facilities. Subsections deal with the entire facility in regard to such topics as electrical equipment, flammable materials, ventilation, fire safety, storage, and illumination.

Although no specific safety regulations have been mandated for Financial Records Clerk programs, it is suggested that strict adherence to the general standards contained in the above-mentioned rules be practiced (e.g., first-aid kits in classrooms, adequate fire extinguishers, fire evacuation plan, etc.).

## PROGRAM IMPLEMENTATION

This section includes information that may help you implement the Financial Records Clerk program: student admission requirements, suggested instructional approach, suggested teaching methods, evaluation criteria, the certificate of completion, an explanation of the components of a student learning guide, cooperative training, and student organization participation.

### Student Admission Requirements

Students enrolled in the Financial Records Clerk program should be able to benefit from the instructional content therein with reasonable expectations for employment upon successful program completion.

In accordance with the Course Code Directory, the Financial Records Clerk program is offered to students at grade levels 10-12, 30, and 31. There are no specific student admission criteria other than those that may be required by local education agencies.

### Suggested Instructional Approach

The instructional content of this vocational program is based on tasks performed and employability skills required on the job. The criteria used for evaluating student performance are determined by job performance standards. Each task to be performed, the conditions under which the student must perform, and the standard by which the performance will be evaluated are made known in explicit terms--in writing--to the student (and to any other interested persons) before instruction. The statement containing this information is often called a performance objective.

Content and pacing decisions are based on the instructional needs of the individual student; that is, on the discrepancies between necessary skills and current skill attainments. Ways of meeting these needs are determined by an assessment of the student's aptitudes, learning styles, and career goals. At any one time, different students will be working on different objectives.

Each student is expected to acquire the necessary knowledge and skills to demonstrate, through performance of each task, that he or she has reached the specified standard of performance. Since actual performance is the only reliable proof of competence, successful completion of the program is dependent on the student's demonstrated attainment of the knowledge and skills for which instruction has been provided.

Competency-based vocational education is strongly recommended as the instructional approach to training students in the Financial Records Clerk program.

### Suggested Teaching Methods

Teaching and learning are inseparable, and together they represent an interactive process between the person teaching and the person learning. Learning occurs

only if and when the learner exhibits some measurable change in behavior. The following are assumptions pertaining to teachers, learners, and the learning process:

1. Learning is transferable. What is learned in one situation can be transferred to another and used to clarify it.

2. Learning takes place faster when moving from simple to the more complex in an orderly, logical way.

3. Learning takes place faster if the learner recognizes something familiar in a new experience. Each experience serves as a background for future experiences.

4. Learning does not occur by itself. Knowledge is influenced by the learner's frame of mind. Attitudes develop towards what is being learned.

5. When a learner sees a charted course geared to specific goals and needs, he or she perseveres.

6. Learning implies activity on the part of the learner.

The instructor implements the course content by designating each skill to be learned and by planning the learning sequence. For example, instruction may consist of a film or live demonstration which reinforces the unit, followed by practice in the learning lab and a performance examination.

Lecture and discussion segments should include time for questions and answers. Students can benefit from regular discussion of "real-world" problems encountered in the work-practice situation.

All types of visual aids, whether commercially available or teacher-produced, can be employed to help clarify concepts for the student. When employed, visual aids should be simple and uncluttered.

The student should be provided with a course outline indicating the topics to be covered. The instructor is also encouraged to employ any other handout material needed for clarification of topics.

Supervised student practice, including demonstration and return demonstration, should be an integral part of the program.

**Evaluation Criteria**

Evaluation of the student's performance in classroom, lab, and clinical situations should be based on

1. quality of work in both written and practical application
2. classroom participation
3. ability to organize and complete assignments
4. ability to perform safely in the clinical area
5. interpersonal relations in the instructional context.

In the classroom and lab, the student will be evaluated by quizzes, tests, and reports; by progress charts; and by skills checklists. In the clinical area, progress charts and skills checklists will be used.

Students are supervised when performing competencies until, in the instructor's judgment, they are able to function safely with minimum assistance.

### Certificate of Completion

A certificate indicating competencies achieved, attendance, and grade level should be awarded to the student upon completion of the program. The certificate can take the form of the Career Merit Achievement Plan (MAP) for Financial Records Clerk.

### Student Learning Guide

As mentioned in the Instructional Approach section of the Florida Vocational Education Program Implementation Guide, competency-based vocational instruction (CBVI) is the most appropriate instructional approach to teaching students to become competent Financial Records Clerks. In order to implement CBVI effectively and efficiently, you and the students should have access to competency-based instructional materials, such as student guides or modules.

A sample student learning guide is provided in the Appendix as an example for you to use when developing or adapting a set of learning guides or modules. This sample guide, although not complete, presents the basic components of a competency-based student learning guide: an introduction, objectives, list of resources, learning activities, information sheets, self-check and answer sheet, activity sheets, written test, and performance test. An answer key for the written test is included in the instructor version of the learning guide.

The following components are often included in a student learning guide:

The **introduction,** which includes the intended outcome, the SPS for which the guide is developed, and an introduction to the guide stating why this topic is important to study and what this guide is about (Other information, such as the relationship between this guide and other guides, can also be included on this sheet.)

The **objectives,** which include both knowledge and performance objectives if the SPS calls for hands-on performance, but only knowledge objectives if the SPS requires knowledge-oriented competencies

The **list of resources,** which includes instructional materials the students should use to study and tools and supplies students should have access to in order to complete this guide

The **learning activities,** which include a list of steps students should take in order to master the objectives

An **information sheet,** which may need to be developed if the existing instructional materials do not cover enough content for students to master the objectives

The **self-check,** which consists of questions designed to help students review what they have studied

The **activity sheet,** which is designed to help students practice hands-on tasks for performance objectives (If the SPS does not require hands-on activity, this sheet is not included in the learning guide.)

The **written test,** which is used to measure the student's achievement on the knowledge objectives

The **performance test,** which is designed to be used by the evaluator/instructor to assess the student's level of achievement on the performance objectives

The student learning guide may consist of two or more sets of the above components (as the sample student learning guide in the Appendix does) if the objectives need to be divided into two or more groups. Whatever format you use for the student learning guide, these components should be included in order to incorporate instructional events such as

1. gaining attention
2. stating objectives
3. recalling prerequisites
4. providing instructional stimulus
5. providing learning guidance
6. eliciting performance
7. providing feedback
8. assessing performance
9. enhancing retention and transfer.

**Cooperative Training**

The Cooperative On-the-Job Training (OJT) course for Financial Records Clerks may be taken by a student for one or more semesters. The specific student performance standards that the student should master to earn credit **must be specified in the OJT training plan.** This plan should include a list of OJT and in-school learning experiences and should be signed by the student, instructor, employer, and cooperative program coordinator. Besides the training plan, each student should have access to a work station with relevant tools and equipment that can facilitate the student's mastery of skills and knowledge necessary to function as a Financial Records Clerk.

The teacher-coordinator must visit each job site **at least** once during each grading period for the purpose of evaluating the student's progress in attaining the competencies listed in the training plan.

The student must receive compensation for work performed on the job and may earn multiple credits.

The student should contact his or her principal, county DCT coordinator, Business Education Supervisor, or Vocational Education Director for additional information such as the required rules, regulations, guidelines, and forms. This information may include requirements for enrolling in the Financial Records Clerk Cooperative Program, objectives of the program, teacher-coordinator responsibilities,

monthly schedules, training plan, employment attendance record, training agreement form, and student skills record.

**Student Organization Participation**

Vocational student organizations operate pursuant to federal and state laws which authorize them as viable components of vocational education programs. According to federal regulations, the vocational education program of instruction may include activities of vocational student organizations which are an integral part of the vocational instruction offered and which are supervised by vocational education personnel. The Florida Board of Education Rules authorize vocational student organizations as an integral part of the vocational education program **(SBER 6A-6.64 (7)** and **6A-6.65 (8)).**

Future Business Leaders of America (FBLA) and Phi Beta Lambda (PBL) are the state and national leadership organizations for high school and postsecondary/collegiate students participating in business and office occupations. The activities of FBLA/PBL strengthen the students' confidence in themselves and their work and provide opportunities to work with business and industry. FBLA and PBL both function as integral parts of the instructional programs and, in addition, promote a sense of civic and personal responsibility.

The FBLA program is designed to enrich and strengthen business and office education at the secondary level. This enrichment may be accomplished through competitive events and activities planned by students under the guidance and direction of the advisor. Some of the competitive events which strengthen the FBLA program are: typewriting, stenography, accounting, business law, office procedures, economics, business communications, public and impromptu speaking, parliamentary procedure, and money management. For the student striving to find a place in the world, these events provide an opportunity for recognition at the local, district, state, and national levels.

PBL is a postsecondary program in which members learn to lead and participate in group discussions, preside over meetings and conferences, work effectively within committees, and engage in practical problem-solving and decision-making activities. Members learn the value of competition on local, state, and national levels by experiencing the responsibility of success as well as the challenge of defeat. Competitive events are directly related to professional employment skills.

FBLA/PBL activities may be continued through the Florida FBLA/PBL Alumni Association. The Alumni Association promotes FBLA/PBL activities through the support of local and state chapters.

## PROFESSIONAL DEVELOPMENT

### Teacher Standards and Technical and Professional Updating

Teacher Standards

School Districts. The teacher is qualified to teach by one of the following methods:

1. regular or temporary Florida teacher's certificate with appropriate coverage;
2. approval of local school board consistent with adopted school policy; or
3. regular or temporary Florida teacher's certificate with other than appropriate coverage; has met all occupational experience requirements prescribed as a prerequisite to appropriate certification; and has been approved by the school board to teach out-of-field.

Listed below are the certification coverages included in the current Course Code Directory for Financial Records Clerk.

BUS ED @4 I 2
VOE @7
ACCOUNTING 7
TEACH CBE @7
BOOKKEEPING @4 @7

Community Colleges. In accordance with **Section 240.335, Florida Statutes,** instructional and administrative personnel of community colleges, as classified under the provisions of **Rule 6A-14.41(6), FAC,** shall not be required to have certificates issued by the state, except as required in **Section 231.3505, Florida Statutes.** For those not required to have certificates, boards of trustees shall set minimum standards which shall be utilized in making personnel decisions at the college.

Technical and Professional Updating

For technical and professional updating inservice activities, instructors at high schools and area vocational-technical centers should contact the district Teacher Education Center (TEC) and Business Education Supervisor. Community college instructors should contact the department of Program and Staff Development of the individual college.

### Professional Organizations and Support Services

Membership in professional associations offers vocational educators an enormous range of opportunities for working together to strengthen the field and to develop personal competence and satisfaction in work. The associations have similar goals and activities. They seek excellence in program content by means of joint efforts among members, communications that keep members current, forums for the discussion of issues in the field, stimulating publications, and useful professional growth experiences at local, state, regional, and national meetings and annual conventions. They are concerned with increasing public understanding and support of the field. They are also good sources of resource materials.

## INSTRUCTIONAL RESOURCES

The following resources were used as references in preparing this guide.


Administrative Rules. Tallahassee, Fla.: Florida Department of Education.

Burtness and Clark. Effective English for Business Communication. Cincinnati: South-Western Publishing Co., 1980.

Business Educational Competencies: Levels I-IV. Tallahassee, Fla.: Center for Instructional Development and Services, Florida State University, 1978-83.

Course Code Directory and Instructional Personnel Assignments. Tallahassee, Fla.: Florida Department of Education.

Crawford, Erickson, and Ownby. Century 21 Typewriting, 3rd Edition. Cincinnati: South-Western Publishing Co., 1982.

FBLA/PBA National Handbook. Washington, D.C.: FBLA/PBL.

FBLA/PBL State Handbook. Tallahassee, Fla.: Florida Department of Education.

Florida Statutes. Tallahassee, Fla.: Florida Department of State, 1985.

Florida Statutes Digest of General Laws. Tallahassee, Fla.: Florida Department of State, 1985.

Out in Front. Tallahassee, Fla.: Florida Department of Education, 1982.

Vocational Education Advisory Committees. Tallahassee, Fla.: Florida Department of Education, Division of Vocational, Adult, and Community Education, 1982.

Vocational Education Program Courses Standards. Tallahassee, Fla.: Florida Department of Education, 1986.


The following are resources that may be helpful in obtaining information and materials for your program:

Bobbs-Merrill Company
4300 West 62nd Street
Indianapolis, IN 46468

William C. Brown Company Publishers
2460 Kerper Boulevard
Dubuque, IA 52001

CBS Educational and Professional Publishing
383 Madison Avenue
New York, NY 10017

Benjamin Cummings Publishing Company
Subsidiary of Addison-Wesley Publishing Company
2727 Sand Hill Road
Menlo Park, CA 94025

Dryden Press
Division of Holt, Rinehart, and Winston, Inc.
901 North Elm
Hinsdale, IL 60521

Glencoe Publishing
17337 Ventura Boulevard
Suite 300
Encino, CA 91316

Harcourt Brace Jovanovich, Inc.
757 Third Avenue
New York, NY 10017

Harper & Row
10 East 53rd Street
New York, NY 10017

Holt, Rinehart, and Winston, Inc.
383 Madison Avenue
New York, NY 10017

Houghton Mifflin Company
2 Park Street
Boston, MA 02107

Richard D. Irwin, Inc.
1818 Ridge Road
Homewood, IL 60430

McGraw-Hill Book Company
1221 Avenue of the Americas
New York, NY 10020

Media Systems Corporation
Harcourt Brace Jovanovich, Inc.
757 Third Avenue
New York, NY 10017

Charles E. Merrill Publishers
Division of Bell and Howell Company
1300 Alum Creek Drive
Columbus, OH 43216

Milady Publishing Corporation
3839 White Plains Road
Bronx, NY 10467

Office Publications
1200 Summer Street
P. O. Box 1231
Stamford, CT 06904

Pitman Learning, Inc.
6 Davis Drive
Belmont, CA 94002

Prentice Hall, Inc.
Route 9W
Englewood Cliffs, NJ 07632

Science Research Associates
Subsidiary of IBM
College Division
1540 Page Mill Road
Palo Alto, CA 94304

Toledo Metal Furniture Company
1111 North Hastings Street
Toledo, OH 43607

Wadsworth Publishing Company
10 Davis Drive
Belmont, CA 94002

West Publishing Company
P. O. Box 3526
St. Paul, MN 55165

John Wiley and Sons, Inc.
605 Third Avenue
New York, NY 10158

Addison-Wesley Publishing Company
1 Jacob Way
Reading, MA 01867

Bobbs-Merrill Company
866 Third Avenue
New York, NY 10022

Doubleday and Company
666 Fifth Avenue
New York, NY 10103

Gower Publishing Company
Old Post Road
Brookfield, VT 05036

IBM Corporation
1133 Westchester Avenue
White Plains, NY 10604

Kent Publishing
18301 Halstead Street
Northridge, CA 91325

Lexington Books
125 Spring Street
Lexington, MA 02173

National Learning Corp.
212 Michael Drive
Syosset, NY 11791

Pergamon
Fairview Park
Elmsford, NY 10523

Reston-Stuart Publishing
P. O. Box 4067
Clearwater, FL 34618

Van Nos Reinhold
115 Fifth Avenue
New York, NY 10003

**Florida Educational Information Service (FEIS)**

If you need (1) information about copyright; (2) a list of instructors teaching in Financial Records Clerk programs in Florida; (3) journal articles or project reports on specific topics; (4) curriculum and instructional materials; or (5) information on current trends, issues, and research, please contact the Florida Educational Information Service (FEIS), Center for Instructional Development and Services, College of Education, Florida State University, 2003 Apalachee Parkway, Tallahassee, Florida 32301, (904) 487-2054. FEIS will tailor its service to meet your needs for information concerning resource materials.

# APPENDIX

## Sample Student Learning Guide

## STUDENT LEARNING GUIDE

**PROGRAM:** Financial Records Clerk

**DUTY AREA:** Typewriting

**TASK:** Type preprinted business forms.

**PERFORMANCE OBJECTIVE:**

Given four tyes of blank preprinted business forms that require typing on lines, in boxes, after guide words, or in columns; a typewriter; necessary supplies; and information necessary for completing the forms; the student will type the information onto the preprinted forms in a usable way. All applicable information must be typed onto the forms in the appropriate spaces, placement of copy must be evenly aligned, and all errors must be neatly corrected.

**DELIVERY SYSTEM:** Lecture, reading, workbook material, group discussion

| LEARNING ACTIVITIES | RESOURCES |
|---|---|
| 1. Complete Resource 1 to obtain information about typing invoices. | 1. Century 21 Typewriting, South-Western Publishing Company |
| 2. Type the invoice described in Resource 2. Then submit the completed assignments to your instructor. | 2. Century 21 Typewriting, assignments 8 and 9 in 136D-144B, p. 228 |
| 3. When you think you can attain this task, take the Knowledge Test. | 3. Knowledge Test |

Adapted from material produced by Ridge Vocational Technical Center.

## KNOWLEDGE TEST

**Directions:** You are to type the invoice on the preprinted invoice form. Below is the information for completing the form. Correct all errors. All applicable information must be typed onto the form in the appropriate spaces, placement of copy must be evenly aligned, and all errors must be neatly corrected.

Invoice: Type invoice No. 1689 in triplicate on 2/24/89 to Top Hits, 3603 St. Johns Bluff Road, Jacksonville, FL 32216, for:

| | | |
|---|---|---|
| 1. fifteen Portable Cassette Players (6903P) | $ 25.00 | $ 375.00 |
| 2. five AM/FM Stereo Receivers (0962R) | 205.00 | 1,025.00 |
| 3. ten 8-Track Tape 10-Pak Assortments (59096T) | 49.50 | 495.00 |
| | TOTAL: | $ 1,895.00 |

Terms are 2/10, net 30; shipment is by truck; the Customer Order No. is 47; the order was sent in on 2/19/89 by your salesperson, P. Bates.

INVOICE NO. _____
DATE _____

SOLD TO

SHIP TO

| Customer Order No. | Salesperson | Order Date | Terms | Ship Via |
|---|---|---|---|---|
| | | | | |

| Code No. | Qty. | Description | Price | Total |
|---|---|---|---|---|
| | | | | |

INVOICE NO. 1689
DATE 2-24-?

SOLD TO
Top Hits
3603 St. Johns Bluff Road
Jacksonville, Fl. 32216

SHIP TO
Same

| Customer Order No. | Salesperson | Order Date | Terms | Ship Via |
|---|---|---|---|---|
| 47 | P. Bates | 2-19-? | 2/10, n/30 | Truck |

| Code No. | Qty. | Description | Price | Total |
|---|---|---|---|---|
| 6903P | 15 | Portable Cassette Players | 25.00 | 375.00 |
| 0962R | 5 | AM/FM Stereo Receivers | 205.00 | 1,025.00 |
| 59096T | 10 | 8-Track Tape 10-Pak Assortments | 49.50 | 495.00 |
| | | | | 1,895.00 |

## Oral and Written Communications

The duties of Financial Records Clerks include the area of oral and written communications, which is divided into three levels. It is suggested that students in a secondary or postsecondary program should include Levels I, II, and III. Listed below are the tasks for Levels I-III which indicate the level of difficulty.

Oral and Written Communications--Level I

1. Locate and record information found in a dictionary.
2. Spell and define words.
3. Find specific information in written material.
4. Write grammatically sound and complete sentences.
5. **Write sentences with correct punctuation, capitalization, abbreviations, and numbers.**
6. Compose and write simple business letters.
7. Follow oral instructions.
8. Greet visitors and give directions.

Oral and Written Communications--Level II

1. Write effective business letters.
2. Compose, arrange, and type a memorandum.
3. Compose and type or write a letter of request.
4. Compose and type or write a letter of transmittal.
5. Compose and type or write a letter of acknowledgment.
6. Compose and type or write a letter of application.
7. Compose and type or write a letter requesting a reference.
8. Compose and type or write a letter of follow-up.
9. **Compose and type or write a routine letter of response.**
10. Prepare, outline, and deliver a short speech.

Oral and Written Communication--Level III

1. Compose and type or write a claim letter.
2. **Compose and type or write a letter approving an adjustment.**
3. Compose and type or write a letter of refusal.
4. Compose and type or write a letter of resignation.
5. Compose and type or write a letter of persuasion.
6. Participate in a group discussion as a member.
7. Participate in a group discussion as a leader.
8. Dictate for a recording medium.
9. Listen to an oral presentation and follow given instructions.

## Sample Student Learning Guides

The following pages will demonstrate examples of learning guides developed for tasks within each of the above levels. Note that these guides have a variety of delivery systems.

STUDENT LEARNING GUIDE

**PROGRAM:** Financial Records Clerk

**DUTY AREA:** Oral and Written Communications--Level I

**TASK:** **Write sentences with correct punctuation, capitalization, abbreviations, and numbers.**

**ENABLING TASK:** Punctuate sentences with commas.

**PERFORMANCE OBJECTIVE:**

Given ten sentences which illustrate common comma usage, but in which the commas have been deleted, the student will insert in writing the necessary commas in the sentences. All required commas must be inserted correctly in at least eight of the ten sentences.

**DELIVERY SYSTEM:** Lecture, printed material, PLATO (Programmed Logic for Automatic Teaching Operations)

| LEARNING ACTIVITIES | RESOURCES |
|---|---|
| 1. Complete Resource 1 to review the rules for applying commas. | 1. Effective Communication in Business, pp. 479-480. |
| 2. Punctuate the sentences in Resource 2. Then check your answers with the key. | 2. *Handout: "Commas" (complete 20 sentences) |
| 3. Complete Resource 3 to apply the rules of commas. | 3. PLATO: Basic Skills English Curriculum lessons 26 and 27 |
| 4. When you think you can attain this task, take the Knowledge Test for this objective. | 4. Knowledge Test |

*The handout is provided by the instructor.

## KNOWLEDGE TEST

**Directions:** In each of the ten sentences below, the necessary commas have been omitted. Read each sentence carefully. Then, write in any required commas. The sentence must be entirely correct in order to count. At least eight of the ten sentences must be correct.

1. If he does not ride call Sam.
2. Every year should bring some rain some snow and some sun.
3. Cars bicycles scooters etc. are to be exhibited.
4. The shirts pants and shoes were purchased yesterday.
5. No he is not considering running for office.
6. Waterford Browne and Company gave us the legal opinion.
7. Our accountant whose office is on Dale Mabry prepared the income tax return.
8. I cannot however permit this to happen.
9. The rivalry between the two teams as you know has been growing each year.
10. When you arrive Mr. Smith you should go directly to the hotel.

## KNOWLEDGE TEST ANSWER KEY

**Directions:** In each of the ten sentences below, the necessary commas have been omitted. Read each sentence carefully. Then, write in any required commas. The sentence must be entirely correct in order to count. At least eight of the ten sentences must be correct.

1. If he does not ride, call Sam.
2. Every year should bring some rain, some snow, and some sun.
3. Cars, bicycles, scooters, etc., are to be exhibited.
4. The shirts, pants, and shoes were purchased yesterday.
5. No, he is not considering running for office.
6. Waterford, Browne, and Company gave us the legal opinion.
7. Our accountant, whose office is on Dale Mabry, prepared the income tax return.
8. I cannot, however, permit this to happen.
9. The rivalry between the two teams, as you know, has been growing each year.
10. When you arrive, Mr. Smith, you should go directly to the hotel.

STUDENT LEARNING GUIDE

**PROGRAM:** Financial Records Clerk

**DUTY AREA:** Oral and Written Communications--Level II

**TASK:** **Compose and type or write a routine letter of response.**

**PERFORMANCE OBJECTIVE:**

Given a role-playing situation that requires composing a routine letter of response, letterhead stationery, information necessary for composing a routine letter of response, and a routine letter of response checklist, the student will compose and type or write an appropriate letter of response. At least seven of the first nine items on the checklist must be rated Acceptable, and all three of the alphabetic items must be rated Acceptable.

**DELIVERY SYSTEM:** Reading, audio media, workbook, group discussion

| LEARNING ACTIVITIES | RESOURCES |
|---|---|
| 1. View and listen to the printed module and cassette on letters of response in Resource 1. Then complete the exercise at the end of the printed module. | 1. a. *Cassette: "Letter of Response"<br>b. Printed module: "Letter of Response" |
| 2. Complete Resource 2 to determine the items that should be included in the letter. | 2. Effective Communication in Business, Chapter 10, pages 221-243. |
| 3. Write a letter of response using the information in Resource 2. | 3. Effective Communication in Business, Chapter 10, page 245, application numbers 8 and 9 |
| 4. Review your applications in a group discussion. | 4. Other students |
| 5. When you think you can perform this task, take the Performance Test. | 5. Performance Test |

*The cassette and printed module are provided by the instructor.

PERFORMANCE TEST_____

**Role-Playing Information for Composing a Routine Letter of Response**

Your boss, Alice Stowe, has received a request to speak at a dinner session of the American Association of Business Women (AABW). The meeting is to be held at the Tallahassee Sheraton beginning at 7:30 p.m. on Wednesday, November 7. Because of Ms. Stowe's deep interest in the goals of AABW, she has asked you to send a letter of response indicating that she will be pleased to attend and speak on "The Role of the American Woman in Today's Management."

Your office is located in Tampa, Florida. Ms. Stowe will be flying to Tallahassee at 5:30 p.m. In your letter, request that an AABW member be at the airport to meet Ms. Stowe and then to take her back to the airport by 11:00 p.m. for a return flight to Tampa.

Ms. Stowe is a member of the local chapter of AABW and is very excited about this dinner and the opportunity to speak to the Tallahassee chapter. She is eager for you to convey her enthusiasm in your letter of response. Address your letter to American Association of Business Women, 2006 Apalachee Parkway, Tallahassee, FL 32301.

Compose and type or write the routine letter of response. Your performance will be rated on the checklist on the next page.

PERFORMANCE CHECKLIST_____

Routine Letter of Response Checklist

| | Rating* | |
|---|---|---|
| | Acceptable | Unacceptable |
| 1. Typed the letter, using correct arrangement. | | |
| 2. Punctuated in the correct style. | | |
| 3. Typed without strikeovers and without spacing errors. | | |
| 4. Spelled all words correctly. | | |
| 5. Constructed grammatically correct sentences. | | |
| 6. Developed only one main idea in each paragraph. | | |
| 7. Used no more than six to eight typewritten lines to a paragraph. | | |
| 8. Made smooth transitions from one sentence to another. | | |
| 9. Made smooth transitions from one paragraph to another. | | |
| 10. Included all important information:<br>a. Provided an answer to the request in the first part of the letter. | | |
| b. Included any additional information or limitations in the letter. | | |
| c. Closed with a goodwill statement or a brief sales statement. | | |

*At least seven of the first nine items and all of the alphabetic items must be rated Acceptable.

STUDENT LEARNING GUIDE

**PROGRAM:** Financial Records Clerk

**DUTY AREA:** Oral and Written Communication--Level III

**TASK:** **Compose and type or write a letter aproving an adjustment.**

**PERFORMANCE OBJECTIVE:**

Given a role-playing situation that requires writing a letter of adjustment to settle a claim, the student will compose and type or write a letter approving an adjustment. A checklist will be used to rate the letter. If the letter is typewritten, all numbered and lettered items must be rated Acceptable. If the letter is handwritten, numbered items 2, 4-10, and all lettered items must be rated Acceptable.

**DELIVERY SYSTEM:** Sound-on-slide, reading, workbook material, group discussion

| LEARNING ACTIVITIES | RESOURCES |
|---|---|
| 1. View sound-on-slide on letter approving an adjustment in Resource 1. Then complete the exercise dealing with a letter that approves an adjustment. | 1. *Sound-on-slide on letter approving an adjustment |
| 2. Complete Resource 2 to determine the items that should be included in the letter. | 2. Effective Communication in Business, Chapter 15, pages 312-321 |
| 3. Write a letter approving an adjustment using the information in Resource 3. | 3. Effective Communication in Business, Chapter 15, page 323, applications 3 and 7 |
| 4. Check your letter through the use of a discussion group. | 4. Other students |
| 5. When you think you can perform the task, take the Performance Test for this objective. | 5. Performance Test |

*The sound-on-slide and exercise are prepared by the instructor.

PERFORMANCE TEST_____

**Directions:** Using the following role-playing situation, compose and type or write a letter approving an adjustment. Your performance will be rated using the checklist on the next page.

You are the customer relations manager for Higgins Appliance Center. On February 9, 1989, you received the following letter from a regular mail-order customer, Hilda Greene:

> "On January 21, 1989, I purchased a 1,500-watt portable space heater (Model No. 6383) from Higgins Appliance Center. The heater worked satisfactorily for the first two weeks; however, on the evening of February 4, 1989, the electric cord short-circuited and burned a large hole in my living room rug.
>
> "Since the cord was defective, the heater should be replaced. A sum of $350 will also be needed to mend the carpet. Enclosed is an estimate from Rob's Rug Repair stating the cost of reweaving.
>
> "Please send a representative of your company to my home to verify the damage and exchange the heater. You may call 477-3692 to confirm a time that is convenient for your representative."

PERFORMANCE CHECKLIST

**Checklist for Typing or Writing a Letter Approving an Adjustment**

| | Rating* | |
|---|---|---|
| | Acceptable | Unacceptable |
| 1. Typed the letter, using the correct format. | | |
| 2. Punctuated in the correct style. | | |
| 3. Typed without strikeovers and without spacing errors. | | |
| 4. Spelled all words correctly. | | |
| 5. Constructed grammatically correct sentences. | | |
| 6. Developed only one main idea in each paragraph. | | |
| 7. Used no more than six to eight typewritten lines to a paragraph. | | |
| 8. Made smooth transitions from one sentence to another. | | |
| 9. Made smooth transitions from one paragraph to another. | | |
| 10. Included all important information: | | |
| a. Opened the letter courteously and with a statement that the request is being granted. | | |
| b. Avoided using negative words. | | |
| c. Expressed appreciation for the customer's bringing the matter to the company's attention. | | |
| d. Expressed goodwill and eagerness to maintain good customer relations. | | |

| | Rating* | |
|---|---|---|
| | Acceptable | Unacceptable |
| e. Gave a clear explanation of the necessary forms to be filled out by the customer, or what should be done with the original article, if replaced. | | |
| f. Closed cordially with an open invitation for future business. | | |

*If the letter is typewritten, all numbered and lettered items must be rated Acceptable. If the letter is handwritten, numbered items 2, 4-10, and all lettered items must be rated Acceptable.

State of Florida
Department of Education
Tallahassee, Florida
Betty Castor, Commissioner
Affirmative action/equal opportunity employer

*Division of Vocational, Adult, and Community Education*

DVACE/07/89/450 123456789/89 BE 127 BK 89

# CAREER MERIT ACHIEVEMENT PLAN (CAREER MAP)

## FINANCIAL RECORDS CLERK

(0507.019901)

STUDENT'S NAME

State of Florida

*An affirmative action/equal opportunity employer*

DEPARTMENT OF EDUCATION
Betty Castor, Commissioner

DIVISION OF VOCATIONAL, ADULT, AND COMMUNITY EDUCATION
Robert S. Howell, Director

**INDUSTRY-BASED PARTNERSHIP PROGRAMS: The State of Florida is committed to the development of industry-based partnership programs, designed by education and industry to respond to industry's demand for a highly skilled work force.**

**PRODUCED BY**

The Center for Instructional Development and Services
College of Education
Florida State University

**FOR FURTHER INFORMATION, CONTACT**

Bureau of Vocational Program and Staff Development
Division of Vocational, Adult, and Community Education
Department of Education
Knott Building
Tallahassee, FL 32399
(904) 488-0484

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## THIS MERIT ACHIEVEMENT PLAN RECORDS THE ACHIEVEMENTS OF:

**Student's Name** _____

**Student's ID Number** _____

**Student's Address** _____

_____

**Instructor's Name** _____ **Initials** _____

**School** _____

_____

**Date Started** _____

## PRIMARY JOB TITLE FOR THIS INSTRUCTIONAL PROGRAM

- Financial Records Clerk

## RELATED JOB TITLES

- Payroll clerk (DOT #215.382-010)
- Statistical clerk (clerical) (DOT #216.382-062)

## ACKNOWLEDGMENTS

The following individuals are recognized for their valuable contributions to the identification and validation of the competencies reflected in this MAP:

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Cathy Smith; American Blueprinting and Supply, Inc.; Winter Park
Kimberly Sterling, C.P.A.; Colley, Trumbower, and Howell; Orlando
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## OVERVIEW

This Career MAP includes the competencies required for entry into the workforce as a financial records clerk. Business and industry representatives have recommended that students in this field master these competencies in order to become employable. Local education agencies (LEAs) may adapt these competencies to meet their work-force needs.

### Purposes of the MAP

The purposes of the MAP are to display the student performance standards (SPSs) required by the LEA and to document the level of achievement on SPSs that the student demonstrates.

### How to Use the MAP

*Administrator and Instructor.* The administrator and instructor can use Career MAPs in curriculum planning, program updating and improvement, and teacher recruitment, selection, and updating. If the LEA changes or adds SPSs, the revised or additional SPSs should be included in the blank boxes that appear within each intended outcome or at the end of this MAP.

*Instructor.* The instructor can use Career MAPs to keep track of student progress on SPSs. By periodically reviewing the ratings on standards, the instructor can identify a student's strengths and weaknesses and on that basis identify the skills for which the student needs remedial instruction or advanced training. MAPs can also be useful in student counseling and evaluation.

*Co-op Instructor/Employer.* The employer who sponsors a co-op program should use the Career MAP for keeping a record of the student's performance on appropriate standards. The MAPs will also help the co-op instructor/employer in counseling and evaluating the student.

*Student.* The student may use the MAP to show potential employers the performance standards he or she has mastered. In order to present a complete record, the student should encourage the instructor to rate his or her level of achievement on all the appropriate SPSs and to fill in the verification form and the cooperative work experience page in the back of this MAP.

*Employer.* The MAP shows an employer the SPSs mastered by the student (a prospective employee) and the proficiency level achieved on each one. This information can help the employer make decisions about hiring, job assignments, and job-training needs.

**Rating Student Performance**

*Performance Competencies.* Ratings on SPSs should be based upon business/industrial performance standards. The evaluator observes and evaluates student performance as he or she would in the role of the employer or supervisor.

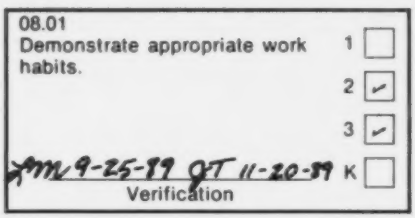
For each skill listed, the learner receives a rating of 1, 2, or 3. Each rating indicates a particular level of achievement:

1 = Learner demonstrates knowledge and understanding of this SPS but is not yet able to apply that knowledge or understanding.

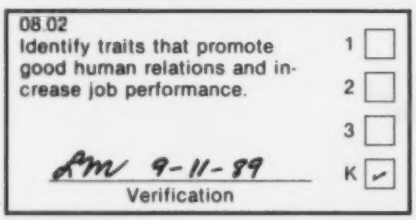
2 = Learner performs this SPS satisfactorily with only periodic supervision.

3 = Learner performs this SPS satisfactorily without supervision.

Whenever a performance standard is demonstrated, the instructor checks the appropriate rating box (1, 2, or 3) and initials and dates the verification line. If the student later demonstrates a higher level of achievement on a performance competency, the instructor checks the higher level and then enters his or her initials and the new date on the verification line, as shown in the following example:




*Knowledge Competencies.* For each SPS that is a knowledge competency only, with no manipulative skill involved, only one level of achievement is possible. If the student masters the competency, he or she receives a check in the bottom box ("K"), as shown below:




NOTE: An SPS without a checked rating indicates that the learner has not mastered the standard from lack of ability, time, opportunity, or need (the student's area of specialization may not have required it).

## 01.0 PERFORM TELEPHONE ACTIVITIES.

| | | |
|---|---|---|
| 01.01<br>Identify telephone services and types of calls.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 01.02<br>Locate telephone numbers and addresses.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |

## 02.0 PERFORM MATH COMPUTATIONS.

| | | |
|---|---|---|
| 02.01<br>Solve addition, subtraction, multiplication, and division problems manually.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 02.02<br>Solve addition, subtraction, multiplication, and division problems using a calculator.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 02.03<br>Solve commission problems.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 02.04<br>Solve finance charge and annual percentage rate problems.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 02.05<br>Solve markup and markdown problems using a ten-key calculator.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 02.06<br>Solve compound interest problems using a ten-key calculator and compound interest table.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 02.07<br>Determine where sufficient, insufficient, or extraneous information is given for solving a problem.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 02.08<br>Complete an invoice.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 02.09<br>Compute totals and sales tax on a sales slip.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 02.10<br>Solve addition, subtraction, multiplication, and division problems using a ten-key calculator or numeric pad.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 02.11<br>Compute discounts.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |

| | | |
|---|---|---|
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |

## 03.0 PERFORM KEYBOARDING / TYPEWRITING ACTIVITIES.

| | | |
|---|---|---|
| 03.01<br>Demonstrate keyboarding techniques.<br>1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 03.02<br>Identify operative parts of keyboarding equipment.<br>1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 03.03<br>Identify formatting principles.<br>1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 03.04<br>Demonstrate speed and accuracy in typing straight copy material.<br>1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 03.05<br>Type business letters and envelopes.<br>1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 03.06<br>Type interoffice memoranda.<br>1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 03.07<br>Type tabulated information.<br>1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 03.08<br>Type different sizes of cards.<br>1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |

## 04.0 PERFORM FILING ACTIVITIES.

| | | |
|---|---|---|
| 04.01<br>Index, code, sort, and file materials alphabetically.<br>1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |

| | | |
|---|---|---|
| 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

## 05.0 PERFORM BUSINESS RECORDS ACTIVITIES.

| | | |
|---|---|---|
| 05.01 Prepare checks and stubs. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 05.02 Endorse checks using special endorsement. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 05.03 Prepare a deposit slip and adjust a checkbook. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 05.04 Prepare bank reconciliations. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 05.05 Enter data into an accounts payable system. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 05.06 Enter data into an accounts receivable system. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 05.07 Enter data into a cash payments system. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 05.08 Enter data into a cash receipts system. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 05.09 Enter data into a payroll system. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

## 06.0 PERFORM MAIL HANDLING ACTIVITIES.

| | | |
|---|---|---|
| 06.01 Classify mail. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 06.02 Locate ZIP codes. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

| | | |
|---|---|---|
| 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

## 07.0 PERFORM COMMUNICATION ACTIVITIES.

| | | |
|---|---|---|
| 07.01 Locate and record information retrieved from written sources. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 07.02 Spell and define words, including business terminology. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 07.03 Follow oral and written instructions. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 07.04 Compose and keyboard a letter of application. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 07.05 Compose and keyboard a resume. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

## 08.0 DEVELOP HUMAN RELATIONS SKILLS.

| | | |
|---|---|---|
| 08.01 Demonstrate appropriate work habits. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 08.02 Identify traits that promote good human relations and increase job performance. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

## 09.0 DEVELOP APPROPRIATE GROOMING HABITS.

| | | |
|---|---|---|
| 09.01<br>Identify appropriate attire and grooming for a business office.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |

## 10.0 PERFORM JOB APPLICATION ACTIVITIES.

| | | |
|---|---|---|
| 10.01<br>Complete employment forms.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 10.02<br>Classify behaviors considered to be appropriate or inappropriate in a job interview situation.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 10.03<br>Compose and type a letter of application and a resume.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |

## 11.0 DEMONSTRATE A KNOWLEDGE OF INFORMATION PROCESSING CONCEPTS.

| | | |
|---|---|---|
| 11.01<br>List the major programming languages used in business data processing.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 11.02<br>Locate requested information on a computer printout.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 11.03<br>Identify applications of computers in business.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |

| | | |
|---|---|---|
| 11.04 Classify fields found within an employee payroll record. 1 2 3 K _____ Verification | 11.05 Classify fields required on a purchase requisition. 1 2 3 K _____ Verification | 11.06 Classify characteristics of recording transactions as either on-line, point-of-sale, or manual. 1 2 3 K _____ Verification |
| 11.07 Calculate batch totals for computer processing. 1 2 3 K _____ Verification | 11.08 Balance a payroll register. 1 2 3 K _____ Verification | 1 2 3 K _____ Verification |
| 1 2 3 K _____ Verification | 1 2 3 K _____ Verification | 1 2 3 K _____ Verification |

## 12.0 DEVELOP LEADERSHIP SKILLS.

| | | |
|---|---|---|
| 12.01 Choose the appropriate action in a situation requiring application of business ethics. 1 2 3 K _____ Verification | 12.02 Identify basic principles of parliamentary procedure. 1 2 3 K _____ Verification | 12.03 Greet and introduce individuals. 1 2 3 K _____ Verification |
| 1 2 3 K _____ Verification | 1 2 3 K _____ Verification | 1 2 3 K _____ Verification |

## 13.0 PERFORM CONSUMER ECONOMICS ACTIVITIES.

| | | |
|---|---|---|
| 13.01 Identify basic concepts of the American economic system. 1 2 3 K _____ Verification | 1 2 3 K _____ Verification | 1 2 3 K _____ Verification |

| | | |
|---|---|---|
| 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

## 14.0 IDENTIFY BUSINESS LAW CONCEPTS.

| | | |
|---|---|---|
| 14.01 Identify basic endorsements used in negotiating commercial paper. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 14.02 Identify original and secondary parties to commercial paper. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

## 15.0 PERFORM BOOKKEEPING/ACCOUNTING ACTIVITIES.

| | | |
|---|---|---|
| 15.01 Identify the basic elements of the bookkeeping/accounting cycle. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 15.02 Prepare an eight-column work sheet. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 15.03 Prepare a post-closing trial balance. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 15.04 Record transactions in the general journal (journalize). 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 15.05 Post entries from the general journal to the general ledger. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 15.06 Prepare an income statement. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 15.07 Prepare an equity statement. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 15.08 Prepare a balance sheet. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 15.09 Prepare, record, and post adjusting entries. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

| | | |
|---|---|---|
| 15.10 Prepare, record, and post closing entries. 1 2 3 K Verification | 15.11 Record purchases transactions in the purchases journal. 1 2 3 K Verification | 15.12 Post purchases journal entries to the accounts payable ledger and general ledger. 1 2 3 K Verification |
| 15.13 Record a purchases returns and allowances transaction in the general journal. 1 2 3 K Verification | 15.14 Post a purchases returns and allowances transaction to the accounts payable ledger and general ledger. 1 2 3 K Verification | 15.15 Record a sales transaction in the sales journal. 1 2 3 K Verification |
| 15.16 Post sales journal entries to the accounts receivable ledger and general ledger. 1 2 3 K Verification | 15.17 Prepare a credit memorandum. 1 2 3 K Verification | 15.18 Record a sales returns and allowances transaction in the general journal. 1 2 3 K Verification |
| 15.19 Post a sales returns and allowances transaction to the accounts receivable ledger and general ledger. 1 2 3 K Verification | 15.20 Record cash receipts transactions in the cash receipts journal. 1 2 3 K Verification | 15.21 Post cash receipts journal entries to the accounts receivable ledger and general ledger. 1 2 3 K Verification |
| 15.22 Record cash payments transactions in the cash payments journal. 1 2 3 K Verification | 15.23 Record the transaction necessary to establish a petty cash fund in the cash payments journal. 1 2 3 K Verification | 15.24 Record the transactions necessary to replenish petty cash in the cash payments journal. 1 2 3 K Verification |
| 15.25 Post the cash payments journal entries to the accounts payable ledger and general ledger. 1 2 3 K Verification | 15.26 Prepare a schedule of accounts payable. 1 2 3 K Verification | 15.27 Prepare a schedule of accounts receivable. 1 2 3 K Verification |
| 15.28 Prepare a W-4 form (Employee's Withholding Allowance Certificate). 1 2 3 K Verification | 15.29 Process a time card. 1 2 3 K Verification | 15.30 Prepare an employee earning record. 1 2 3 K Verification |
| 15.31 Prepare a payroll voucher check. 1 2 3 K Verification | 15.32 Prepare a payroll document/ record. 1 2 3 K Verification | 15.33 Prepare a W-2 form (Wage and Tax Statement). 1 2 3 K Verification |

| | | |
|---|---|---|
| 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

## 16.0 IDENTIFY FUNCTIONS OF DATA PROCESSING.

| | | |
|---|---|---|
| 16.01 Identify computer hardware and software. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 16.02 Identify generic data processing terms. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 16.03 Identify the relationship between a source document and a single transaction on a unit of record. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 16.04 Identify major types of careers in data processing with the duties and educational requirements of each. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 16.05 Sequence and define the steps of a processing cycle. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 16.06 Identify symbols used in flowchart applications. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

## 17.0 PERFORM DECISION-MAKING ACTIVITIES.

| | | |
|---|---|---|
| 17.01 Choose appropriate actions in situations requiring application of business ethics. 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification | 1 ☐ 2 ☐ 3 ☐ K ☐ Verification |

## 18.0 OPERATE DATA ENTRY EQUIPMENT.

| | | |
|---|---|---|
| 18.01<br>Set up a work station following correct procedures for logging on and off system.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 18.02<br>Prepare the key entry format for a data entry device.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 18.03<br>Enter and verify data from source documents.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 18.04<br>Add, modify, delete, and correct records in a file.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 18.05<br>Locate information in a data file.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 18.06<br>Identify correct solutions to error messages using a reference manual.<br>1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |
| 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification | 1 ☐ 2 ☐ 3 ☐ K ☐<br>Verification |

FINANCIAL RECORDS CLERK

| | | |
|---|---|---|
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |

FINANCIAL RECORDS CLERK

## COOPERATIVE WORK EXPERIENCE COMPETENCIES.

| | | |
|---|---|---|
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |
| 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification | 1 ☐<br>2 ☐<br>3 ☐<br>K ☐<br>Verification |

## VERIFICATION

Each instructor who rates this student on competencies in this MAP should fill in one of the boxes below.

Initials _____ Signature _____

Title _____

School Name _____

School Address _____

Initials _____ Signature _____

Title _____

School Name _____

School Address _____

Initials _____ Signature _____

Title _____

School Name _____

School Address _____

## COOPERATIVE WORK EXPERIENCE

In addition to classroom training and laboratory performance identified on the Career MAP, this student has participated in cooperative work experience with employers, as shown below.

Dates _____ Employer _____

Employer's Address _____

_____

Supervisor _____

Supervisor's Title _____

Dates _____ Employer _____

Employer's Address _____

_____

Supervisor _____

Supervisor's Title _____

Dates _____ Employer _____

Employer's Address _____

_____

Supervisor _____

Supervisor's Title _____

## NOTES

This section of the MAP is provided for the instructor, employer, or student to list additional qualifying statements or other pertinent information. All comments should be initialed for verification.

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